

eWorkforce Tool Guidance



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1	Workforce Planning	4
1.1	Context	4
1.2	Realistic workforce planning	4
1.3	Developing the detail	5
1.4	Support	5
1.5	Ongoing	6
1.6	Technical considerations	6
1.6.1	Organisations and STPs	6
1.6.2	Funded Establishment	6
1.6.3	Relationship between funding and establishment	6
1.6.4	Primary care	7
1.6.5	Mental Health	7
1.7	Schedule	7
2	Accessing eWorkforce	8
2.1	As an existing user	8
2.1.1	Logging in and password reset	8
2.1.2	Using an invitation email as a known user	9
2.1.3	Joining the website as a known user	9
2.2	As an unknown user	10
2.2.1	Using an invitation email as an unknown user	10
2.2.2	Joining the website as an unknown user	11
2.3	Registering from the login screen	11
3	eWorkforce commands and dashboards	15
3.1	My Organisation	18
3.2	Multiple Organisations	18
4	Workforce Demand	19
	Filtering Tasks	19
4.1	Navigating and entering data in the Workforce Demand section	19
4.1.1	Task Lists	19
4.1.2	Task Icon meaning	19
4.1.3	Workforce Demand sections (rows)	23
4.1.4	Workforce Demand Totals	24
4.2	Downloading and Uploading demand data	24
4.2.1	Downloading, editing and uploading demand data	24
5	Finalise and Submit	28
6	Terminology	30
7	Support Section	32
7.1	Guidance Document	32
7.2	HEE Local Office and HEE Support	32

7.3 Third line support.....32

1 Workforce Planning

This document provides guidance for completing the eWorkforce Tool (online Collective Forecast Demand Template) which will enable aggregation of current and projected funded workforce ('establishment') to sustainability and transformation partnership (STP), Regional and overall national positions. The e-workforce tool is part of a data support package Health Education England (HEE) is developing.

The intended audience of this guidance is workforce planning leads in provider organisations in England. Please note some of the features presented in this guidance may differ slightly from the final version of the tool.

1.1 Context

The Long Term Plan sets the ambition of developing a new operating model for workforce which can respond to changing capacity, capability and needs.

The growing shortages of health care staff is an international phenomenon, playing out in a UK context of rising population and significant shifts in demographic mix.

Such workforce shortages impact patients. There are no 'silver bullets', problems are systemic, and solutions varied. Different parts of the system (individual organisations, STP/ICSs, NHS regions and national bodies) need to act in concert, to pull all the levers that can be pulled individually and collectively to:

- enhance existing workforce supply;
- grow future workforce supply;
- mitigate current and future workforce demand.

To bring this about requires that the system as a whole:

- acknowledge that actions are required throughout the health care system by national, regional, local system, and individual organisations;
- empower different parts of the system to pull those levers they are best positioned to pull;
- acknowledge there are inherent tensions between acting as an organisation to address organisational problems, and acting as a system partner to address system problems;
- work collectively to resolve these tensions.

1.2 Realistic workforce planning

Realistic workforce planning entails

- describing the services local systems plan to provide in the context of funding available and the priorities described in the Long Term Plan and the Interim People Plan;
- translating those service plans into requirements for workforce in a manner that acknowledges the different groups that make up that workforce, and the differential change in demand for those groups;
- assessing the potential supply of the different groups against demand;

- agreeing what can realistically be done to bring the two into closer alignment;
- describing the plan to do those things;
- enacting, monitoring and adapting that plan at system level.

Assessment of funded workforce demand against available supply means using intelligence on both at the 'right' level of detail.

1.3 Developing the detail

Aggregate data on workforce numbers and costs of staff groups at 'high level' are vital for financial planning. However, these are not sufficient for realistic workforce planning: services are delivered by teams comprising doctors, clinical professionals, and support staff. An adult nurse is trained quite differently from a child nurse; a physiotherapist is not the same as a dietician; clinical engineering is a completely different scientific discipline to infection; a paediatrician is not trained to work with the elderly, a trauma surgeon does not operate on the brain. It follows that in order to

- understand current and potential future gaps between supply and demand;
- explore potential interventions to align these (including changing skill mix, accelerating CPD, investing more in the newer workforce groups, deployment, targeted retention initiatives);

it is necessary to understand the supply of, and express funded demand for, individual groups.

HEE is releasing 'e-Workforce' for the recording of workforce establishment at the level of individual groups. This tool will be pre-populated with current (March 2019) Staff in Post at the level of individual organisation, as per the NHS Electronic Staff Record, with the facility to input alternative data.

The use of the tool is intended for Trusts and its use can be extended to non-NHS providers.

1.4 Support

To support the delivery of the workforce element of the overall strategic plan a number of products and services will be introduced over the next three months. It is for regional teams to determine how best to present the outputs from these HEE tools:

- A universal supply projection (USP) tool, will be available to HEE regional offices which provides a projection of the overall size of workforce for individual groups to 2024 at the level of STP on a 'do nothing' basis. That is, the tool will indicate the extent to which the workforce is likely to change in the absence of interventions to alter supply.
- HEE is developing a modelling tool (ATHENA) that will enable STP/ICSSs to understand how the supply of key groups is sensitive to key assumptions on recruitment, training and retention for Clinical Professionals.

For medical staff the pipeline for new CCT holders (i.e. those who complete their Certificate of Consultant Training and are thus eligible to apply for consultant posts) is largely fixed by numbers already in training. Hence while there are projections of

CCT holder supply at the level of specialty and geography, there is not a 'scenario' tool for medical staff.

Projections of funded establishment will be input to 'e-Workforce' by Trusts.

STPs workforce leads will have 'real time' access to the data, subject to the agreement of contributing organisations

As the tool is populated with current and projected establishment, STPs will observe current workforce 'gap' and the potential residual gap in 2024.

HEE will gather, collate and analyse the workforce establishment projections and position this in the context of the supply projections at the level of the STP/ICS system in a product that will be made available to all STPs.

1.5 Ongoing

There are known significant challenges associated with:

- Projecting establishment into the future;
- Identifying gaps and developing interventions to close such gaps, and that both the techniques for doing this and the estimated values will iterate over time.

It is further acknowledged that:

- Supplying granular (deadline 27th September 2019), will represent a significant challenge.
- Regional teams from HEE and NHSI/E will be working alongside STP/ICSs up until the date of the NHSI/E final submission (15th November 2019), to support the development of realistic workforce plans.

The precise details of the delivery of the support package outlined above will be determined locally.

1.6 Technical considerations

1.6.1 Organisations and STPs.

Each whole organisation will be mapped to its lead STP.

1.6.2 Funded Establishment

'Funded establishment' is defined as the total number of posts the organisation would recruit to where the supply available. It is understood that organisations may take slightly different approaches to this.

1.6.3 Relationship between funding and establishment

For the purposes of the NHSE/I collection tool collects data in terms of 'in year' values. Thus, the staffing expenditure and WTE data are sought in that 'currency';

HEE's 'currency' is establishment at a given point – the end of the financial year.

Thus the 2018-19 stock is the stock at 31st March 2019, and the 'funded demand' is the establishment at the same date. Hence the 2024 establishment relates the end of the year 2024.

eWorkforce Tool Guidance

The template incorporates two options for aggregation from the inputs to e-workforce to the NHSEI template

Option 1 (which we understand to be the approach most organisations will adopt): Assume that all posts are established at the start of the year. That is the 31 March 2020 establishment is the WTE to which the 2019-20 funding relates, and the 2024 establishment is the WTE to which the 2023-24 funding relates. Initial soundings indicate this is generally the most common approach. The e-workforce tool will contain an aggregation section that does this.

Option 2: Assume that the establishment grows evenly over the course of the year, or switches from the start to the end point mid-year. In this case the funding for 2019-2020 would relate to the average of the establishment at March 2019 and March 2020, and the funding for 2023-24 would relate to the average of the establishment at March 2023 and March 2024. A second aggregation section will accommodate this option.

1.6.4 Primary care

As noted in the NHSE/I guidance the intention is to collect more granular information on different staff groups. Further guidance on the detail will follow from NHSE/I.

1.6.5 Mental Health

A further bespoke template will be added after the initial September submission drilling down in further detail with regard to Mental Health. Further detail will follow.

1.7 Schedule

Week commencing 19 th August	e-workforce goes live for input Helpdesk goes live
27 th September	Data harvested
Week commencing 30 th September	Analysis tool out to system
15 th November	Data harvested
Week commencing 18 th November	Analysis tool out to system

2 Accessing eWorkforce

2.1 As an existing user

The eWorkforce Tool can be found here:

<https://eworkforce.hee.nhs.uk/>

All users must login to access their pages, input data and download reports.

2.1.1 Logging in and password reset

On the login page, you can retrieve your password, join a collection or submit a request to register as a new user.

The login screen looks like this:

Figure 1: Login Screen

Enter your email address and password to login. If you have forgotten your password, please click on 'forgotten your password' where you will be prompted to enter your email address in the following screen:

Figure 2: Password Reset

A password reminder will be sent to your email address.
If you see the following screen:

Figure 3: Password reset for unknown email

Then either you have not previously registered or you have entered your email address incorrectly. You must be registered to use the system before you can reset your password.

2.1.2 Using an invitation email as a known user

If you have received an email inviting you to contribute, the email will contain a link to use to access the system.

Figure 4: Invitation to Contribute

2019 Strategic System Plan Submission Process

Data Collection

As a Workforce Planner for Heavy Energy Limited, you have been invited to contribute to the following data collection, 2019 Strategic System Plan Submission Process.



Health Education England

The [NHS Long Term Plan](#) of developing a new operating model for workforce which can respond to changing capacity, capability and needs. Realistic workforce planning entails assessment of funded workforce demand against available supply means using intelligence on both at the 'right' level of detail.

Different parts of the system (individual organisations, STP/ICSS, NHS regions and national bodies) need to act in concert, to pull all the levers that can be pulled individually and collectively to:

- enhance existing workforce supply
- grow future workforce supply
- mitigate current and future workforce demand

To bring this about requires that the system as a whole:

- acknowledge that actions are required throughout the health care system by national, regional, local system, and individual organisations
- empower different parts of the system to pull those levers they are best positioned to pull

You already have a user account registered to use eWorkforce. The data collection will be available to you the next time you log in.

Click [here](#) to view your collection tasks.

If you have forgotten your log in details, please go to [Reset Password](#) and follow the instructions.

This email was sent from eWorkforce on the behalf of the Health Education England data collection.

The information contained in this communication from the sender is confidential. It is intended solely for use by the recipient and others authorised to receive it. If you are not the recipient, you are hereby notified that any disclosure, copying, distribution or taking action in relation of the contents of this information is strictly prohibited and may be unlawful.

2.1.3 Joining the website as a known user

If you have been provided with an invitation code then you should press the join button on the login screen. As you are a known user, you will be shown the following screen:

Enter your password and you will be sent to the dashboard.

2.2 As an unknown user

2.2.1 Using an invitation email as an unknown user

Figure 5: Invitation to Contribute

2019 Strategic System Plan Submission Process
Data Collection

NHS
Health Education England

You have been invited to contribute to 2019 Strategic System Plan Submission Process for Derbyshire Community Health Services NHS Foundation Trust by Richard Starkey in the following areas:

- **Workforce Planner**
Note from Richard Starkey: "Would you mind filling this in with me?"

We don't have a eWorkforce user account assigned to this email address.

Before you are able to participate in the collection, you will need to register. It is a simple process, just click the link below and follow the instructions.

[Register](#) to use eWorkforce.

This email was sent from eWorkforce on the behalf of the Health Education England data collection.

The information contained in this communication from the sender is confidential. It is intended solely for use by the recipient and others authorised to receive it. If you are not the recipient, you are hereby notified that any disclosure, copying, distribution or taking action in relation of the contents of this information is strictly prohibited and may be unlawful.

Clicking the link in the email will take you to a page that will allow you to create a user account. The password you create here will be the password you will use in future to access the portal.

Figure 6: Create Account Page

Account set up – Workforce Planner

As the Workforce Planner for healthcare science for Heavy Energy Limited please set up an account to use the eWorkforce Data Collection Tool. This will allow you to organise the collection and submission of workforce information to Health Education England.

Your contact details

Email address

Name

Telephone

Job title

Your password

New password

Confirm new password

[Create user account](#)

[Return to login](#)

Enter the information requested and press the create user account button. An account will be created for you which you can use to access the portal in the future. Your password must have between 8 and 16 letters, with a mix of uppercase and

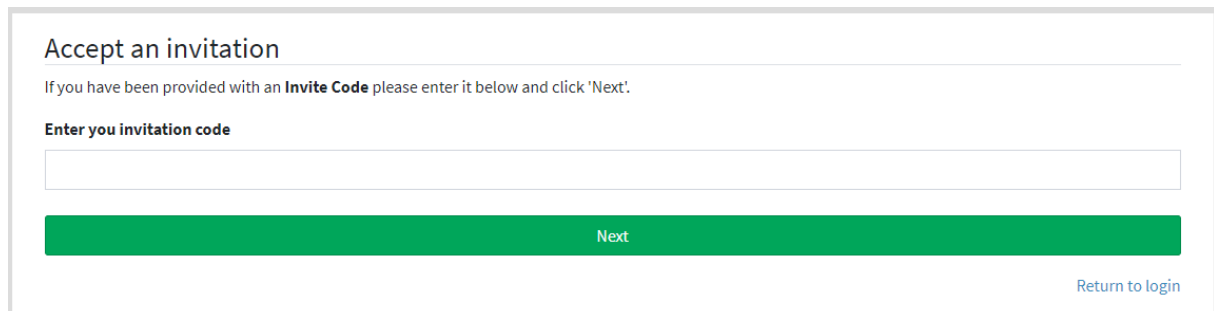
lowercase letters, with one or more symbols and numbers. After you have created your account, you will be taken to the [Login Screen](#)

2.2.2 Joining the website as an unknown user

On pressing the join button, you will be presented with the following screen

Figure 7: Using an Invite Code

If you have been given an invite code (the invite code is 4 groups of letters separated by a dash - something like ABCD-EFGH-IJKL-MNOP), you can click the “HAVE AN INVITE CODE” link on the [Login Screen](#). Clicking that link will show you the following screen:



Accept an invitation

If you have been provided with an **Invite Code** please enter it below and click 'Next'.

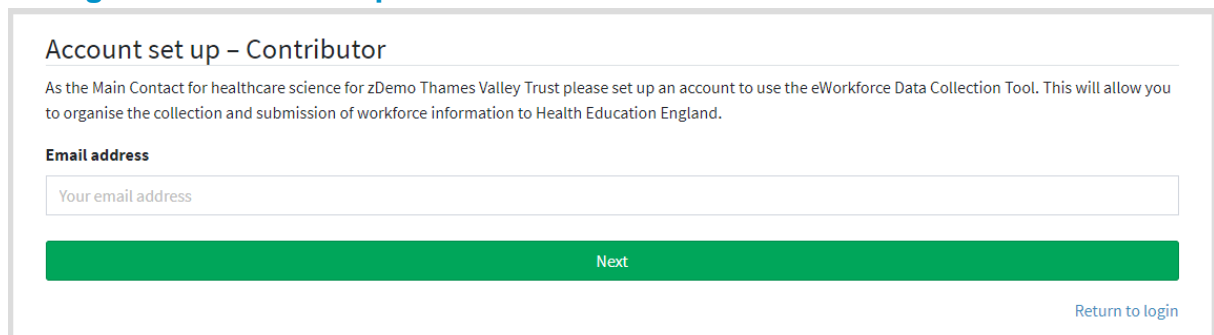
Enter your invitation code

Next

[Return to login](#)

Enter your invite code . When you've pressed the Next button, you will see this screen:

Figure 8: Set up account



Account set up – Contributor

As the Main Contact for healthcare science for zDemo Thames Valley Trust please set up an account to use the eWorkforce Data Collection Tool. This will allow you to organise the collection and submission of workforce information to Health Education England.

Email address

Next

[Return to login](#)

Enter your email address and on pressing Next, you will be able to create an account as detailed above.

2.3 Registering from the login screen.

If you click the “REGISTER TO USE EWORKFORCE” card on the login screen, you will be taken through a registration progress to access the system. Clicking the register card will show you this screen:

Figure 9: Registering for a collection

The screenshot shows the eWorkforce interface. At the top, there is a blue header with a home icon and the text 'eWorkforce'. Below the header, the text reads 'Please select a collection' followed by 'The following collections are currently active:'. A table lists the available collections:

Collection name	Run by
2019 Strategic System Plan Submission Process	Health Education England

At the bottom right of the table area, there is a green button labeled 'Next'.

Select a collection that you wish to work on (in this case, there is only one collection) and press the next button. You will then be asked to provide your email address in the next screen:

Figure 10: Registering your email address

The screenshot shows the eWorkforce interface. At the top, there is a blue header with a home icon and the text 'eWorkforce'. Below the header, the text reads 'Registration email address 2019 Strategic System Plan Submission Process'. Underneath, it says 'Email address' followed by a text input field containing the placeholder text 'Please provide an email address'. At the bottom right, there is a green button labeled 'Next'.

If you have never registered with eWorkforce before, you will be asked to provide personal details to set up your account. You will be shown this screen:

Figure 11: Registering contact details for the first time

The screenshot shows the eWorkforce interface. At the top, there is a blue header with a home icon and the text 'eWorkforce'. Below the header, the text reads 'Your contact details 2019 Strategic System Plan Submission Process'. The form contains several fields:

- Email address:** A text input field containing 'john@heavyenergy.com'.
- Name:** A text input field with a red border. Below it, the text 'Full name' is displayed in red.
- Telephone:** A text input field with a red border. Below it, the text 'Contact telephone number is required in case we need to verify your identity' is displayed in red.
- Job title:** A text input field with a red border. Below it, the text 'Please give us your job title. You can change it later.' is displayed in red.

At the bottom right, there is a green button labeled 'Next'.

Fill in your personal details and press the “Next” button. You will then be asked to provide your organisation code in the next screen:

Figure 12: Registering - providing your organisation

The screenshot shows the 'Your organisation code' section of the eWorkforce tool. The page title is 'Your organisation code 2019 Strategic System Plan Submission Process'. Below the title, it says 'Please enter the details of the organisation to which you wish to contribute.' There are two input fields: 'ODS Code' with a placeholder 'Org Code' and 'Org Name' with a placeholder '[Not found]'. At the bottom right, there are two buttons: 'I don't have an ODS code' and 'Next'.

If you have an ODS code, enter it into the ODS code box, if you don't have an ODS code press the "I don't have an ODS code" button to be shown the following screen:

Figure 13: Don't have an ODS code

The screenshot shows the 'Your organisation codes' section of the eWorkforce tool. The page title is 'Your organisation codes 2019 Strategic System Plan Submission Process'. Below the title, it says 'Select an organisation code from the following list:'. A scrollable list contains the following organisation names: 4 Ways Healthcare Ltd, ABC Ltd, Acculabs Diagnostics UK Ltd, Action for Deafness, Advance Histopathology Laboratory Ltd, Alimentary Innervations Ltd, Alliance Medical Limited, Almac Diagnostics Ltd, Aspen Healthcare Limited, Cellular Pathology Services Ltd, Christie Pathology Partnership LLP, Cobalt Health, CooperGenomics, County Pathology Ltd, and DEF Ltd. At the bottom right, there is a 'Next' button.

When you have either entered your ODS code as in [Registering - providing your organisation](#) or selected your ODS code as in [Don't have an ODS code](#) Figure 13: there will be two options for the next screen after pressing the next button. If you have previously registered for a different collection, this will be confirmed, and the following screen will be shown:

Figure 14: Registering when already a contact

The screenshot shows the 'Confirm' section of the eWorkforce tool. The page title is 'Confirm 2019 Strategic System Plan Submission Process'. Below the title, it says 'You are about to register on behalf of **Heavy Energy Limited** to participate in **2019 Strategic System Plan Submission Process**'. It then states 'These following details will be used to validate your identity.' Under the heading 'Your details', there is a section for 'Email address' with a text input field containing 'pete@heavyenergy.com'. Below this, it says 'You are already registered to use the application for **pete@heavyenergy.com**, so we will use the details supplied for this account.' At the bottom right, there is a 'Submit Registration Request' button.

If this is the first time that you are using eWorkforce, you will be shown the following screen:

Figure 15: Registration as a new user

Confirm *2019 Strategic System Plan Submission Process*

You are about to register on behalf of **Heavy Energy Limited** to participate in **2019 Strategic System Plan Submission Process**

These following details will be used to validate your identity.

Your details

Email address

Name

Telephone

Job title

[Submit Registration Request](#)

In either case, press the Submit Registration Request button to submit your request. When you have pressed the button, your request will be submitted, and you will be shown the following screen:

Figure 16: Registration Request Submitted

Your request has been submitted

Before we can make the application available to you we will need to verify your account. The process shouldn't take long to complete.

What happens next

- You have been sent a confirmation email to confirm this request.
- The HEE team will validate your request. *please note: we may need to contact you for further information*
- If you are successful, you will be sent an invitation to create your login details. Or if contribution is not open to or required by your organisation, we will send you a notification.

[Return to login page](#)

Your request will then be reviewed by an administrator. If your registration request is accepted, you will be invited to contribute and sent an invitation email, If you are an existing user see [Using an invitation email as a known user](#), if you are a new user see [Using an invitation email as an unknown user](#)

3 eWorkforce commands and dashboards

General rules:



green buttons perform an action which accepts changes



Red buttons cancel an action and loses all changes

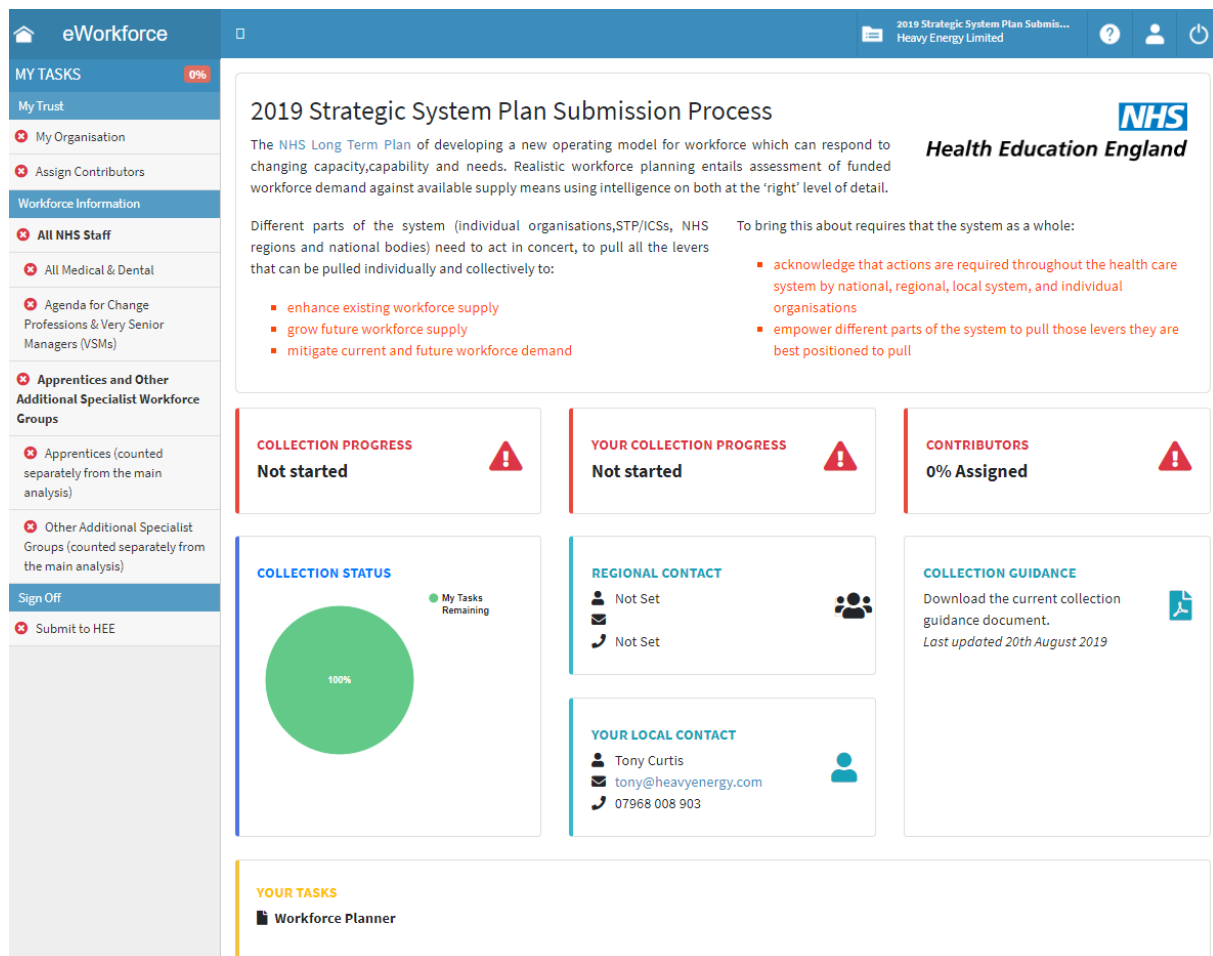


Blue buttons perform actions - like download/upload data



Amber buttons perform special actions

Figure 17: Workforce Plan Dashboard



Under the introductory text in the main panel, there will be a set of dashcards showing information about your collection status, including contact information, and providing clickable links to other areas of eWorkforce. The “Collection Guidance” link

will allow you to download the latest version of the collection guidance document, this document. The date in the link will change as changes are made to the document and newer versions made available.

The “Collection Progress” link will take you to a screen like this:

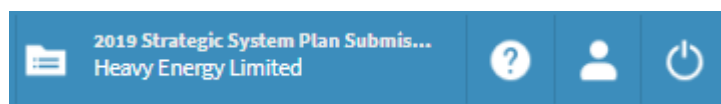
Figure 18: Collection Progress

Task	Contributor	Progress	Completed
My Trust			
My Organisation	Tony Curtis	0%	-
My Organisation	John Smith	0%	-
Assign Contributors	John Smith	0%	-
Assign Contributors	Tony Curtis	0%	-
Workforce Information			
All NHS Staff	Tony Curtis	1%	-
All NHS Staff	John Smith	0%	-
All Medical & Dental	John Smith	0%	-
All Medical & Dental	Tony Curtis	0%	-
Agenda for Change Professions & Very Senior Managers (VSMs)	Tony Curtis	2%	-
Agenda for Change Professions & Very Senior Managers (VSMs)	John Smith	0%	-
Apprentices and Other Additional Specialist Workforce Groups	John Smith	0%	-
Apprentices and Other Additional Specialist Workforce Groups	Tony Curtis	0%	-
Apprentices (counted separately from the main analysis)	John Smith	0%	-
Apprentices (counted separately from the main analysis)	Tony Curtis	0%	-
Other Additional Specialist Groups (counted separately from the main analysis)	Tony Curtis	0%	-
Other Additional Specialist Groups (counted separately from the main analysis)	John Smith	0%	-
Sign Off			
Board sign off	Unassigned	-	-
Submit to HEE	Tony Curtis	0%	-
Submit to HEE	John Smith	0%	-

Clicking on the amber button on the right allows you to send messages to other contributors directly from the app.

Going back to the [Workforce Plan Dashboard](#), the top of the page will have navigation options.

Figure 19: Navigation buttons



The navigation buttons above, which are displayed at the top of the screen, have the following functions from left to right:

- 1) Select another collection - allows you to select a collection to work on
- 2) Help and support - Provides help and support on the system
- 3) Manage your account and account details - see [Change User details](#)
- 4) Log out of the system and be sent back to the login screen - See [Login Screen](#)

Figure 20: Change User details

Your user account

The screenshot shows two side-by-side forms. The left form, titled 'Your details', has three input fields: 'Full name' (containing 'John Smith'), 'Phone number' (containing '07000 123456'), and 'Job title' (containing 'Workforce Planner'). Below these fields is a blue 'Update' button. The right form, titled 'Change your password', has three input fields: 'Current password', 'New password', and 'Confirm new password'. Below these fields is a blue 'Change password' button.

You will find the following navigational features listed down the left-hand side of the dashboard.

Figure 21: Dashboard Navigation Features (Workforce Planner View)

The screenshot shows a vertical navigation menu on the left side of the dashboard. It starts with a blue header 'MY TASKS' with a red '0%' badge. Below this is a blue section 'My Trust'. The menu items are: 'My Organisation', 'Assign Contributors', 'Workforce Information' (blue section), 'All NHS Staff', 'All Medical & Dental', 'Agenda for Change Professions & Very Senior Managers (VSMs)', 'Apprentices and Other Additional Specialist Workforce Groups' (bolded), 'Apprentices (counted separately from the main analysis)', 'Other Additional Specialist Groups (counted separately from the main analysis)', 'Sign Off' (blue section), and 'Submit to HEE'.

This menu is explained in the section Task Lists

3.1 My Organisation

The first section on the dashboard navigation contains information about your healthcare provider and the people who will work on your submission. It is divided into two subsections; healthcare provider details and contributors.

When you first log in, we ask that you check that your healthcare provider details are correct. Click 'My Organisation' and check your details.

Figure 22: My Organisation Page

My Organisation John Smith ▾ Cancel Save

ODS Code Org Name

Location

Address

Postcode

About

Organisation Type

HEE

HEE - Local Office

STP

HEE - Regions

You can change your organisations address here and review other details. Click the green save button once the necessary changes, if any, have been made. Depending on your privileges, you may or may not be able to change this form.

3.2 Multiple Organisations

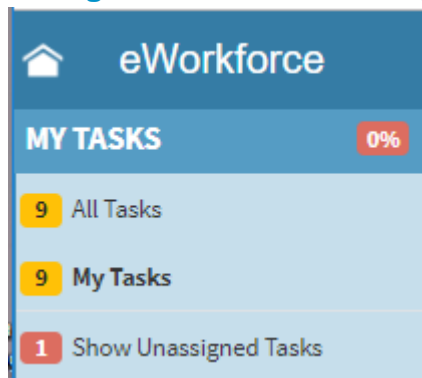
If a workforce planner (or a contributor) works across multiple organisations **using the same email address**, the eWorkforce platform will recognise this. The user will then be able to choose which organisation they are entering data for.

4 Workforce Demand

Filtering Tasks

You can filter whether you see all tasks for this collection, or you see only those that you are a contributor for. Click on the MY TASKS menu at the top left of the screen and select either All Tasks or My Tasks:

Figure 23: Selecting Tasks



From here you can select whether to view all tasks or only those tasks that you are a contributor to.

4.1 Navigating and entering data in the Workforce Demand section

4.1.1 Task Lists

This section is broken down in a hierarchical list of tasks, for example, the following **could** be a list of task headings that you may see:

1. All NHS Staff
 - 1.1. All Medical and Dental
 - 1.2. Agenda for Change Professionals & Very Senior Managers (VSMs)
2. Apprentices and Other Additional Specialist Workforce Groups
 - 2.1. Apprentices (counted separately from the main analysis)
 - 2.2. Other additional specialist Groups (counted separately from the main analysis)
3. Sign Off
 - 3.1. Submit to HEE


These tasks are shown on the left-hand side of the screen in menu format.

4.1.2 Task Icon meaning

The tasks in the hierarchical list will have small icons to left of the text:

Figure 24: Task Icons

Icon	Meaning
	Indicates that this is a parent task - clicking on this task will provide a form for viewing data for all of this task's sub-tasks.
	This indicates that this is an incomplete task that is assigned to you. You can edit the demands in this task.
	Indicates that the task is incomplete, and the task is not assigned to you. You can only view the tasks in this demand.

	Indicates that the task is complete
---	-------------------------------------

Click on a task and you will be presented with a form to fill in. Most forms will look much like an excel spreadsheet.

Figure 25: Read only Demand Template

All Medical & Dental

John Smith ▾

Staff Category	Baseline			Baseline	Forecast				
	ESR Staff in Post	Staff in Post	SIP Diff	Establishment (funded) posts	Establishment - 2020 to 2024				
	31st Mar 19	31st Mar 19	31st Mar 19	31st Mar 19	31st Mar 20	31st Mar 21	31st Mar 22	31st Mar 23	31st Mar 24
All Medical & Dental	124.00	0.00	-124.00	0.00	0.00	0.00	0.00	0.00	0.00
All Medical	120.00	0.00	-120.00	0.00	0.00	0.00	0.00	0.00	0.00
All Dental	4.00	0.00	-4.00	0.00	0.00	0.00	0.00	0.00	0.00
All Medical Consultants	114.00	0.00	-114.00	0.00	0.00	0.00	0.00	0.00	0.00
All other medical excluding GP trainees in GP settings and Foundation trainees	2.00	0.00	-2.00	0.00	0.00	0.00	0.00	0.00	0.00
All GP trainees in GP settings	2.00	0.00	-2.00	0.00	0.00	0.00	0.00	0.00	0.00
All Foundation trainees	2.00	0.00	-2.00	0.00	0.00	0.00	0.00	0.00	0.00
Dental Consultants	2.00	0.00	-2.00	0.00	0.00	0.00	0.00	0.00	0.00
Dental other than consultants	2.00	0.00	-2.00	0.00	0.00	0.00	0.00	0.00	0.00
Emergency Medicine 030, 130	2.00	✖	---						
Anaesthetics 091, 191	2.00	✖	---						
Intensive Care Medicine 034, 134	2.00	✖	---						
Acute and General Internal Medicine 035, 135, 001, 101	2.00	✖	---						
Endocrinology and Diabetes Mellitus 017, 117	2.00	✖	---						
Gastroenterology 018, 118	2.00	✖	---						
Geriatric Medicine 011, 111	2.00	✖	---						
Respiratory Medicine 004, 104	2.00	✖	---						
Cardiology 007, 107	2.00	✖	---						
Neurology 006, 106	2.00	✖	---						
Nuclear Medicine 016, 116	2.00	✖	---						
Palliative Medicine 094, 194	2.00	✖	---						
Histopathology 074, 174	2.00	✖	---						
Haematology 073, 173	2.00	✖	---						
Clinical Radiology 080, 180	2.00	✖	---						
Clinical Oncology 026, 126	2.00	✖	---						
Medical Oncology 012, 112	2.00	✖	---						
General and Adult Psychiatry 052, 152	2.00	✖	---						
Old Age Psychiatry 096, 196	2.00	✖	---						

If you are a contributor to this task, you will be able to enter data into the cells and save what you've entered. In the above example, the person is not a contributor to All Medical and Dental and so they will not be able to enter or save data. All that they can do is view the data.

Contrast this form with the following form:

Figure 26: Editable Demand Template

All Medical & Dental ⚠ John Smith ▾ Excel ▾ Cancel Save

Staff Category	Baseline			Baseline	Forecast				
	ESR Staff in Post	Staff in Post	SIP Diff	Establishment (funded) posts	Establishment - 2020 to 2024				
	31st Mar 19	31st Mar 19	31st Mar 19	31st Mar 19	31st Mar 20	31st Mar 21	31st Mar 22	31st Mar 23	31st Mar 24
All Medical & Dental	124.00	0.00	-124.00	0.00	0.00	0.00	0.00	0.00	0.00
All Medical	120.00	0.00	-120.00	0.00	0.00	0.00	0.00	0.00	0.00
All Dental	4.00	0.00	-4.00	0.00	0.00	0.00	0.00	0.00	0.00
All Medical Consultants	114.00	0.00	-114.00	0.00	0.00	0.00	0.00	0.00	0.00
All other medical excluding GP trainees in GP settings and Foundation trainees	2.00	0.00	-2.00	0.00	0.00	0.00	0.00	0.00	0.00
All GP trainees in GP settings	2.00	0.00	-2.00	0.00	0.00	0.00	0.00	0.00	0.00
All Foundation trainees	2.00	0.00	-2.00	0.00	0.00	0.00	0.00	0.00	0.00
Dental Consultants	2.00	0.00	-2.00	0.00	0.00	0.00	0.00	0.00	0.00
Dental other than consultants	2.00	0.00	-2.00	0.00	0.00	0.00	0.00	0.00	0.00
Emergency Medicine 090,130	2.00	×	---						
Anaesthetics 091,191	2.00	×	---						
Intensive Care Medicine 094,194	2.00	×	---						
Acute and General Internal Medicine 095,195,001,101	2.00	×	---						
Endocrinology and Diabetes Mellitus 017,117	2.00	×	---						
Gastroenterology 016,116	2.00	×	---						
Geriatric Medicine 011,111	2.00	×	---						
Respiratory Medicine 004,104	2.00	×	---						
Cardiology 007,107	2.00	×	---						
Neurology 006,106	2.00	×	---						
Nuclear Medicine 016,116	2.00	×	---						
Palliative Medicine 094,194	2.00	×	---						
Histopathology 074,174	2.00	×	---						
Haematology 073,173	2.00	×	---						
Clinical Radiology 090,190	2.00	×	---						
Clinical Oncology 026,126	2.00	×	---						
Medical Oncology 012,112	2.00	×	---						
General and Adult Psychiatry 092,192	2.00	×	---						
Old Age Psychiatry 096,196	2.00	×	---						

At the top right of the screen there are now options to save, download and upload data (via a dropdown from the Excel button) - the person is a contributor to this task list.

In order to enter information/data you need to click on the cells and enter your value. You must only enter numeric values in the cells as text will not be saved.

There are three ways which you can use to navigate between cells. You can

- Use your mouse to click cells;
- Use the TAB or ENTER key on your keyboard or
- Use the arrows on your keyboard.

You must enter some data to complete the section. When you start entering data, you will see that the row heading for the data that you are entering changes, looking like this:

Figure 27: Bulk Row Editing Options

Staff Category	Baseline			Baseline	Forecast				
	ESR Staff in Post	Staff in Post	SIP Diff	Establishment (funded) posts	Establishment - 2020 to 2024				
	31st Mar 19	31st Mar 19	31st Mar 19	31st Mar 19	31st Mar 20	31st Mar 21	31st Mar 22	31st Mar 23	31st Mar 24
All Medical & Dental Comments No FTEs	124.00	0.00	-124.00	0.00	0.00	0.00	0.00	0.00	0.00
All Medical	120.00	0.00	-120.00	0.00	0.00	0.00	0.00	0.00	0.00
All Dental	4.00	0.00	-4.00	0.00	0.00	0.00	0.00	0.00	0.00
All Medical Consultants	114.00	0.00	-114.00	0.00	0.00	0.00	0.00	0.00	0.00
All other medical excluding GP trainees in GP settings and Foundation trainees	2.00	0.00	-2.00	0.00	0.00	0.00	0.00	0.00	0.00
All GP trainees in GP settings	2.00	0.00	-2.00	0.00	0.00	0.00	0.00	0.00	0.00
All Foundation trainees	2.00	0.00	-2.00	0.00	0.00	0.00	0.00	0.00	0.00
Dental Consultants	2.00	0.00	-2.00	0.00	0.00	0.00	0.00	0.00	0.00
Dental other than consultants	2.00	0.00	-2.00	0.00	0.00	0.00	0.00	0.00	0.00
Emergency Medicine <small>080, 130</small>	2.00	✘	---						
Anaesthetics <small>081, 181</small>	2.00	✘	---						

To make it easier to bulk fill empty cells with zero data, each row has a bulk editing option that is shown when you click on the row header under “Staff Category”. Clicking on a coloured header shows the options “Comment” (See [Comment box](#)) and “No Ftes”, which fills all of the empty cells within that section with zeros.

Clicking on the “No FTEs” link in the above example will fill any empty cell in the whole demand with a zero.

Clicking on a row header for an editable row (white background) will give the following options:

1. Comments
2. No FTE's
3. Clear
4. Undo

When you click on the green **comments** text, the following box is shown:

Figure 28: Comment box

Consultant Healthcare Scientists ✕

Healthcare Science\Life Sciences\Genetics\Cancer Genomics - Molecular Pathology of Acquired Disease\All Qualified Staff

Comments or notes

This content is saved immediately.

Cancel
Save comments

eWorkforce Tool Guidance

You can enter a comment for this row here, you must press save comments to save the comment, if you don't want to enter a comment, press cancel. Comments allows you to put a comment for that row.

When you click on the blue **No FTEs** link, all of the cells in that row are filled with zero.

When you click on the black **Clear** link, all of the cells are emptied

When you click on the red **Undo** link, all of your changes are reverted to what they were before - when you entered the screen

You may save the document at any time and return to it later, if you wish. If you press cancel, all your unsaved updates will be lost.

4.1.3 Workforce Demand sections (rows)

Figure 29: Workforce Demand Editing Description

Please note: To better illustrate the totalling options, this image is taken from a test collection and not a live collection.

Genetics ⚠ Enter values as full-time equivalents (FTEs) NOT headcount | Your Task (36%) | Excel | Cancel | Save

Staff Category	Baseline		Forecast					
	A	B	C					
	Staff in Post	Establishment (funded posts)	Workforce size - 2020 to 2024					
	31st Mar 19	31st Mar 19	31st Mar 20	31st Mar 21	31st Mar 22	31st Mar 23	31st Mar 24	
Genetics	A	B	C					
Genetics	170.00	188.00	81.00	138.00	144.00	149.00	163.00	
CANCER GENOMICS - MOLECULAR PATHOLOGY OF ACQUIRED DISEASE	B	B						
CANCER GENOMICS - MOLECULAR PATHOLOGY OF ACQUIRED DISEASE	109.00	119.00	32.00	86.00	90.00	91.00	103.00	
All Qualified Staff	C	C						
All Qualified Staff	63.00	73.00	17.00	49.00	52.00	51.00	58.00	
Director of Healthcare Science Services	2.00	3.00	2.00	2.00	3.00	3.00	3.00	
Consultant Healthcare Scientists	3.00	3.00	3.00	3.00	3.00	3.00	3.00	
Healthcare Science Managers	8.00	10.00	2.00	6.00	7.00	6.00	8.00	
Healthcare Scientists/Specialist Healthcare Scientists - HCPC registered	11.00	16.00	4.00	8.00	9.00	9.00	10.00	
Healthcare Scientists/Specialist Healthcare Scientists - non-HCPC registered	18.00	20.00	5.00	12.00	12.00	12.00	12.00	
Healthcare Science Practitioners/Specialist Healthcare Science Practitioners (including technicians, technologists and equivalent roles)	21.00	21.00	1.00	18.00	18.00	18.00	22.00	
All Support Staff and Trainees	E	E						
All Support Staff and Trainees	46.00	46.00	15.00	37.00	38.00	40.00	45.00	
Healthcare Science Associates	4.00	4.00	2.00	3.00	4.00	3.00	4.00	
Healthcare Science Assistants	5.00	5.00	2.00	5.00	5.00	5.00	5.00	
Trainee Healthcare Scientist - STP Programme	5.00	5.00	3.00	4.00	5.00	5.00	5.00	
Trainee Healthcare Scientist - Non-STP (or equivalence programme)	6.00	6.00	2.00	5.00	5.00	5.00	6.00	
Trainee or Apprentice Healthcare Science Practitioners	6.00	6.00	2.00	4.00	5.00	5.00	5.00	
Trainee or Apprentice Healthcare Science Associates	8.00	8.00	2.00	7.00	7.00	7.00	8.00	
Trainee or Apprentice Healthcare Science Assistants	12.00	12.00	2.00	9.00	9.00	10.00	12.00	
GENOMIC COUNSELLING	G	G						
GENOMIC COUNSELLING	61.00	69.00	49.00	52.00	54.00	58.00	60.00	
All Qualified Staff	H	H						
All Qualified Staff	61.00	69.00	49.00	52.00	54.00	58.00	60.00	
Director of Healthcare Science Services	10.00	12.00	4.00	5.00	6.00	7.00	8.00	
Consultant Healthcare Scientists	5.00	6.00	5.00	5.00	6.00	6.00	6.00	
Healthcare Science Managers	3.00	3.00	2.00	2.00	2.00	2.00	2.00	
Healthcare Scientists/Specialist Healthcare Scientists - HCPC registered	8.00	9.00	7.00	7.00	7.00	8.00	8.00	
Healthcare Scientists/Specialist Healthcare Scientists - non-HCPC registered	13.00	15.00	10.00	11.00	11.00	12.00	12.00	
Healthcare Science Practitioners/Specialist Healthcare Science Practitioners (including technicians, technologists and equivalent roles)	22.00	24.00	21.00	22.00	22.00	23.00	24.00	
All Support Staff and Trainees	I	I						
All Support Staff and Trainees	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Healthcare Science Associates								
Healthcare Science Assistants								

Explanation

- A:** Column containing the *actual* number of staff in each job role in FTEs (Full Time Equivalentents)
- B:** Column containing the *required* number of staff in each job role in FTEs
- C:** Column containing the estimated workforce for following years
- A:** Sum off all entries for this specialism, the sum of **B** and **G**
- B:** The sum of all entries for this speciality, the sum of **C** and **E**
- C:** The sum of all qualified staff for this speciality, the sum of entries in box **D**
- D:** All qualified staff for the speciality, separated over job role
- E:** The sum of all support staff and trainees, the sum of all entries in box **F**
- F:** All support staff and trainees, separated over job role
- G:** The sum of all entries for this speciality, the sum of **H** and all other entries when they have been filled in
- H:** The sum of all qualified staff for this speciality, the sum of entries in box **I**

I: All qualified staff for the speciality, separated over job role

4.1.4 Workforce Demand Totals

Clicking on the topmost menu item in the task list (All NHS Staff) allows you to view all of the data entered for this collection.

Figure 30: Collection summary headings

Staff Category	Baseline			Baseline	Forecast				
	ESR Staff in Post	Staff in Post	SIP Diff	Establishment (funded) posts	Establishment - 2020 to 2024				
	31st Mar 19	31st Mar 19	31st Mar 19	31st Mar 19	31st Mar 20	31st Mar 21	31st Mar 22	31st Mar 23	31st Mar 24
All NHS Staff	300.00	35.00	-265.00	43.00	45.00	45.00	45.00	45.00	45.00
All Medical & Dental	124.00	0.00	-124.00	0.00	0.00	0.00	0.00	0.00	0.00
All Medical	120.00	0.00	-120.00	0.00	0.00	0.00	0.00	0.00	0.00
All Dental	4.00	0.00	-4.00	0.00	0.00	0.00	0.00	0.00	0.00
All Medical Consultants	114.00	0.00	-114.00	0.00	0.00	0.00	0.00	0.00	0.00
All other medical excluding GP trainees in GP settings and Foundation trainees	2.00	0.00	-2.00	0.00	0.00	0.00	0.00	0.00	0.00
All GP trainees in GP settings	2.00	0.00	-2.00	0.00	0.00	0.00	0.00	0.00	0.00
All Foundation trainees	2.00	0.00	-2.00	0.00	0.00	0.00	0.00	0.00	0.00
Dental Consultants	2.00	0.00	-2.00	0.00	0.00	0.00	0.00	0.00	0.00
Dental other than consultants	2.00	0.00	-2.00	0.00	0.00	0.00	0.00	0.00	0.00
Emergency Medicine <small>080, 130</small>	2.00	X	---						
Anaesthetics <small>081, 191</small>	2.00	X	---						

4.2 Downloading and Uploading demand data

If you find it easier, you can download the demand data and do the editing in Microsoft® Excel. In the following demand, the user has partially filled in the data and now wants to finish of filling in the data in Excel.

4.2.1 Downloading, editing and uploading demand data

In the demand, press the Excel button at the top of the screen and select either “Download template with data” or “Download blank template”.

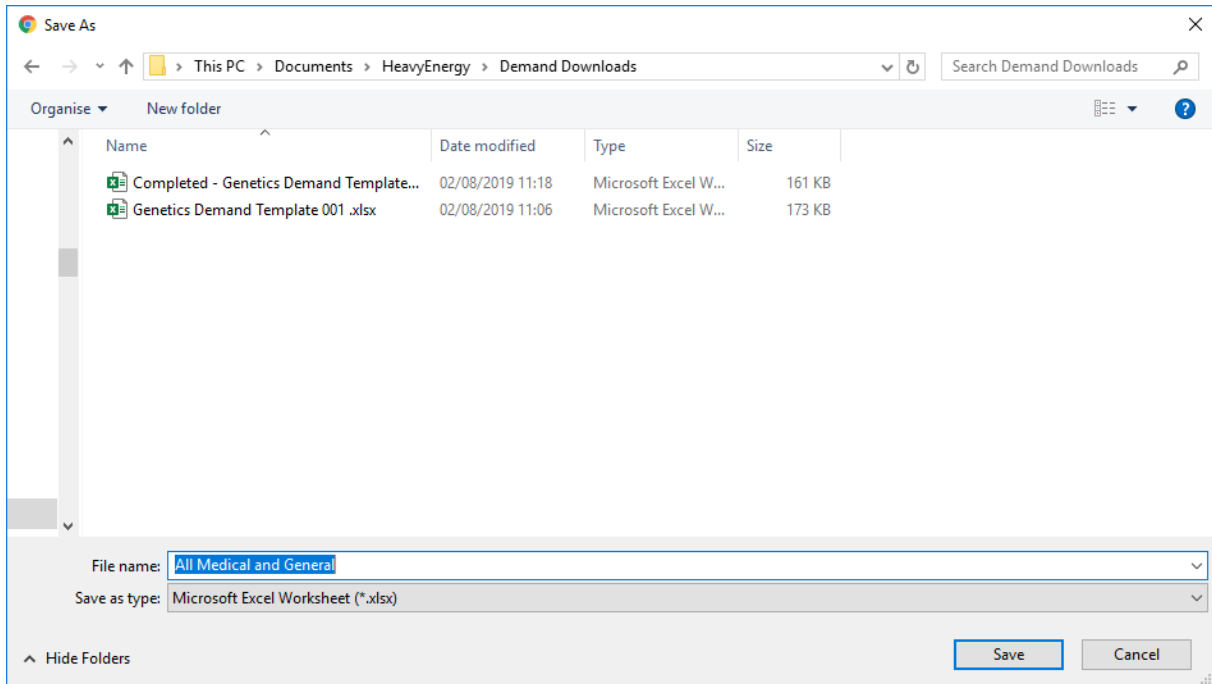
Figure 31: Downloading a demand

All Medical & Dental
John Smith ▾
Excel ▾
Cancel
Save

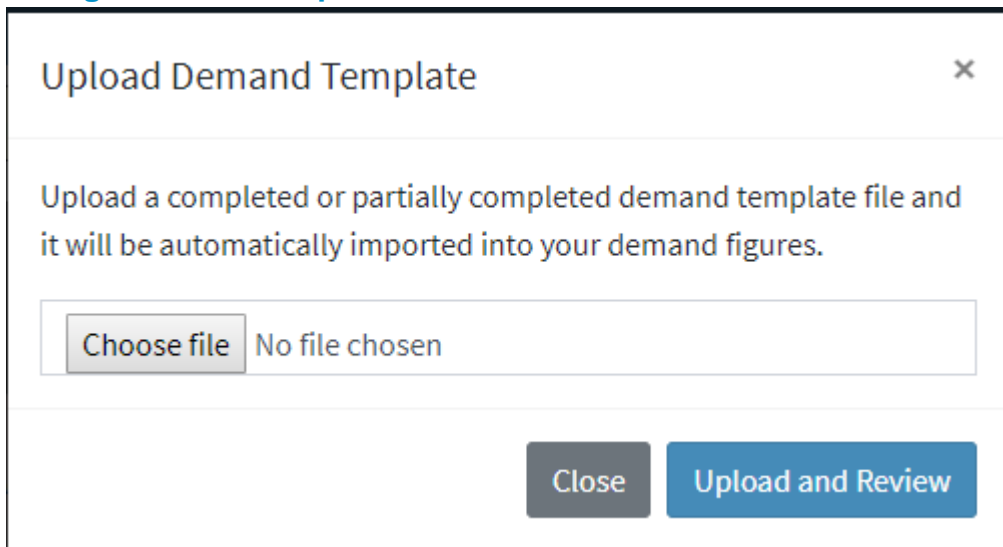
Staff Category	Baseline			Baseline	Forecast				
	ESR Staff in Post	Staff in Post	SIP Diff	Establishment (funded) posts	Establishment - 2020 to 2024				
	31st Mar 19	31st Mar 19	31st Mar 19	31st Mar 19	31st Mar 20	31st Mar 21	31st Mar 22	31st Mar 23	31st Mar 24
All Medical & Dental	124.00	0.00	-124.00	0.00	0.00	0.00	0.00	0.00	0.00
All Medical	120.00	0.00	-120.00	0.00	0.00	0.00	0.00	0.00	0.00
All Dental	4.00	0.00	-4.00	0.00	0.00	0.00	0.00	0.00	0.00
All Medical Consultants	114.00	0.00	-114.00	0.00	0.00	0.00	0.00	0.00	0.00
All other medical excluding GP trainees in GP settings and Foundation trainees	2.00	0.00	-2.00	0.00	0.00	0.00	0.00	0.00	0.00
All GP trainees in GP settings	2.00	0.00	-2.00	0.00	0.00	0.00	0.00	0.00	0.00

Download template with data
Download blank template

Press either of the options shown and after a few seconds you will be asked to select a location and name for your download spreadsheet. Choose a location on your computer and enter a meaningful name for the spreadsheet. As I intend to enter All medical and general information here, I choose an appropriate name.

Figure 32: Selecting a location for the demand download

When you've selected a location and entered your file name, press the save button. Depending on your browser, a confirmation will appear somewhere near the bottom left of your browser window. Locate the file in your folders and double click on it to open Excel and edit the file. When you have finished editing the file, save it (you can use the same name or you can rename it for clarity) and exit Excel. Now, back in the demand screen, press the Upload button and the following pop up box is displayed:

Figure 33: Upload and Review

Press the choose file button and select the file that you saved in Excel. The text in the box saying "No File Chosen" will change to the name of the file that you chose. Press the Upload and Review button, eWorkforce will read the file and show you a confirmation screen.

Figure 34: Import confirmation screen

Demand Template Item ID	DisplayName	Staff In Post	Demand Current	Demand Year 1	Demand Year 2	Demand Year 3	Demand Year 4	Demand Year 5	Estimated SIP	Commentary	Errors
✓ 40138	All NHS Staff	450.00	1138.00	1140.00	1208.00	1288.00	1365.00	1440.00	0.00	0	
✓ 40139	All Medical & Dental	186.00	406.00	408.00	434.00	471.00	504.00	532.00	0.00	0	
✓ 40144	All Medical	180.00	388.00	390.00	415.00	452.00	484.00	511.00	0.00	0	
✓ 40145	All Dental	6.00	18.00	18.00	19.00	19.00	20.00	21.00	0.00	0	
✓ 40204	All Medical Consultants	171.00	372.00	374.00	396.00	432.00	462.00	487.00	0.00	0	
✓ 40206	All other medical excluding GP trainees in GP settings and Foundation trainees	3.00	3.00	3.00	4.00	4.00	5.00	6.00	0.00	0	
✓ 40208	All GP trainees in GP settings	3.00	10.00	10.00	11.00	12.00	12.00	12.00	0.00	0	
✓ 40210	All Foundation trainees	3.00	3.00	3.00	4.00	4.00	5.00	6.00	0.00	0	
✓ 40213	Dental Consultants	3.00	11.00	11.00	12.00	12.00	12.00	12.00	0.00	0	
✓ 40216	Dental other than consultants	3.00	7.00	7.00	7.00	7.00	8.00	9.00	0.00	0	
✓ 40148	Emergency Medicine	3.00	4.00	6.00	6.00	6.00	6.00	7.00			
✓ 40149	Anaesthetics	3.00	6.00	6.00	6.00	7.00	7.00	7.00			
✓ 40150	Intensive Care Medicine	3.00	3.00	3.00	3.00	4.00	5.00	5.00			
✓ 40151	Acute and General Internal Medicine	3.00	13.00	13.00	13.00	13.00	13.00	14.00			
✓ 40152	Endocrinology and Diabetes Mellitus	3.00	1.00	1.00	2.00	3.00	4.00	4.00			
✓ 40153	Gastroenterology	3.00	2.00	2.00	3.00	4.00	5.00	5.00			
✓ 40154	Geriatric Medicine	3.00	1.00	1.00	1.00	2.00	2.00	2.00			

Review the uploaded data and, if it is correct, press the import button. This may take a short while to complete, please do not press any other buttons or close the page while this process completes. When the process has finished, you will be shown a confirmation screen:

Figure 35: Upload Confirmation

In this example, the All Medical and Dental was completed and the green tick next to it and it's children in the hierarchical list shows that it was completed.

4.3 Board Signoff

It may be that board signoff is required before a collection can be finalised and submitted. If this is the case, one of the tasks in the hierarchical tree will be “Board Signoff”. This task can be completed by anyone that has been allocated that task, this person does not necessarily have to be a board member. Selecting this task will show the following screen:

Figure 36: Board Signoff

Sign off Tony Curtis ▾ Cancel Save

The NHS Long Term Plan sets the ambition of developing a new operating model for workforce which can respond to changing capacity, capability and needs. eWorkforce is part of a support package Health Education England is providing to enable the Sustainability and Transformation Partnerships (STPs), in developing realistic workforce plans. It is recognised that this information:

- has been confirmed and supported within the organisation (including where appropriate at Board level) and is made using the best information available at this time;
- contributes towards a repository for demand data, comprising of the current levels and future forecasts of the workforce required within the organisation and as such, is reflective of known factors particularly with respect to finance and activity;
- will be used by colleagues in Health Education England, NHS England and NHS Improvement when considering the implications of this return, including triangulating with other data from the strategic planning round;
- will be used at an STP \ ICS level (including by colleagues within the STP \ ICS) to understand the wider implications on the workforce and to inform further analysis, risks and actions in respect of supply and demand assessments.

When the assigned board member has checked the collection and it has been accepted, select the “Accept” option and save the screen. Assuming all other tasks have been completed, the collection is now ready to be finalised and submitted.

5 Finalise and Submit

Once all sections have been completed, the hierarchical menu on the left will have all ticks, apart from “Submit to HEE”. To complete the collection, click on the Submit To HEE menu item. The following screen will be shown

Figure 37: Submitting a collection

The screenshot shows the 'Submit to HEE' interface. On the left is a 'MY TASKS' sidebar with a 100% completion indicator. The main area displays a table of tasks with columns for Task, Contributor, Progress, and Completed. A 'Submit' button is visible in the top right corner.

Task	Contributor	Progress	Completed
My Trust			
My Organisation	Tony Curtis	100%	21/08/2019
My Organisation	John Smith	100%	21/08/2019
Assign Contributors	John Smith	100%	21/08/2019
Assign Contributors	Tony Curtis	100%	21/08/2019
Workforce Information			
All NHS Staff	John Smith	100%	21/08/2019
All NHS Staff	Tony Curtis	100%	21/08/2019
All Medical & Dental	Tony Curtis	100%	21/08/2019
All Medical & Dental	John Smith	100%	21/08/2019
Agenda for Change Professions & Very Senior Managers (VSMs)	John Smith	100%	21/08/2019
Agenda for Change Professions & Very Senior Managers (VSMs)	Tony Curtis	100%	21/08/2019
Apprentices and Other Additional Specialist Workforce Groups	John Smith	100%	21/08/2019
Apprentices and Other Additional Specialist Workforce Groups	Tony Curtis	100%	21/08/2019
Apprentices (counted separately from the main analysis)	Tony Curtis	100%	21/08/2019
Apprentices (counted separately from the main analysis)	John Smith	100%	21/08/2019
Other Additional Specialist Groups (counted separately from the main analysis)	Tony Curtis	100%	21/08/2019

Click on the green submit button at the top right of the screen, a confirmation box will appear:

Figure 38: Sign Off Collection

The screenshot shows a confirmation dialog box titled 'Sign off collection?'. The text inside reads: 'You are about to sign-off your collection. Please ensure you are happy with the data provided before you proceed.' At the bottom, there are two buttons: 'Cancel' (orange) and 'Proceed' (green).

Click 'Yes' to submit your return. Once submitted the section will reflect this. The return has now been submitted and this will be reflected in the home screen, showing a green tick next to the “Submitted to HEE” link.

Figure 39: Submitted Return

MY TASKS 100%

My Trust

- ✔ My Organisation
- ✔ Assign Contributors

Workforce Information

- ✔ All NHS Staff
- ✔ All Medical & Dental
- ✔ Agenda for Change Professions & Very Senior Managers (VSMs)
- ✔ Apprentices and Other Additional Specialist Workforce Groups
- ✔ Apprentices (counted separately from the main analysis)
- ✔ Other Additional Specialist Groups (counted separately from the main analysis)

Sign Off

- ✔ Submit to HEE

2019 Strategic System Plan Submission Process

Health Education England

The NHS Long Term Plan of developing a new operating model for workforce which can respond to changing capacity, capability and needs. Realistic workforce planning entails assessment of funded workforce demand against available supply means using intelligence on both at the 'right' level of detail.

Different parts of the system (individual organisations, STP/ICSS, NHS regions and national bodies) need to act in concert, to pull all the levers that can be pulled individually and collectively to:

- enhance existing workforce supply
- grow future workforce supply
- mitigate current and future workforce demand

To bring this about requires that the system as a whole:

- acknowledge that actions are required throughout the health care system by national, regional, local system, and individual organisations
- empower different parts of the system to pull those levers they are best positioned to pull

COLLECTION PROGRESS

Submitted to HEE

✔

YOUR COLLECTION PROGRESS

Submitted to HEE

✔

CONTRIBUTORS

Complete

✔

COLLECTION STATUS

● My Tasks Completed

100%

REGIONAL CONTACT

👤 Not Set

✉ Not Set

☎ Not Set

COLLECTION GUIDANCE

Download the current collection guidance document.

Last updated 20th August 2019

YOUR TASKS

- 📅 Workforce Planner

Your collection has now been submitted.

6 Terminology

Informed by the National Minimum Dataset definitions v2.6 & National Workforce Planners discussion

The terms and definitions as stated below have been reached via consensus and are relevant to the completion of the Collective Forecast Demand Template via Local teams to the HEE national team. The terms utilised in local discussion / other circumstances may mean different things to different audiences:

In alphabetical order:

Establishment – Sometimes referred to as ‘Baseline Demand’ or ‘Demand’; sometimes as ‘Authorised’ or ‘Planned’ or ‘Budgeted’ resource. Generally expressed as ‘WTE’ (see below)

- This item is the number of staff in post and number of vacancies, for example, if you had 20 midwives and 1 vacant midwife positions, your baseline demand would be 21. This may be greater than, less than or equal to actual staff in post, depending on number of vacancies the organisation has now.
- The employing healthcare provider should capture all their employees under establishment and should capture their future demand as the total number of consultants they will need to employ to deliver the totality of the service that they have funds to provide (even if part of the cost of employing the consultant will be come from cross charging another healthcare provider). healthcare providers will need to collaborate to understand actual future demand.

Fill rate – is a percentage of posts filled. It is calculated by dividing actual staff in post by the Establishment.

Full Time Equivalent (FTE) - this item may also be known as “Whole time equivalent (WTE)”. This is the standard method for defining the amount of work of an employee or in a position. It is the basis for most planning and monitoring of the workforce. The workforce is usually expressed in terms of WTE and Headcount numbers. Contracted WTE is calculated by dividing Contracted Hours or Contracted Sessions by the Standard Hours (or Sessions) for the Grade. For example: if the standard hours for a nurse are 37.5 and an individual Staff Nurse contracts to work 22 hours per week, then that employee's WTE is $22 \div 37.5 = 0.59$ WTE. If the standard hours for a full time Junior Doctor are 40 hours a week and an individual Junior Doctor contracts to work 40 hours per week, then that employee's WTE is $40 \div 40 = 1.00$ WTE Note that a similar formula is used when calculating Worked WTE, Budgeted WTE or Paid WTE.

Forecast workforce demand – the future estimated required workforce demand (establishment) as at a particular point in time (reflective of the replacement for leavers plus predicted change in capacity required plus vacant posts)

Staff in Post –the number of staff directly employed by the Provider organisation (exclusive of; agency, bank, locum or hosted staff), usually measured in terms of Full time equivalent (FTE)

Workforce demand - The total number of staff (usually of a given group) required, or forecast to be required, in order to deliver a given (level of) service at a given point in time

7 Support Section

7.1 Guidance Document

Users can download the guidance document as described in section [Workforce Plan Dashboard](#). If this document does not answer your question, please contact your regional lead as described in the following paragraph.

7.2 HEE Local Office and HEE Support

HEE Local Offices and HEE nationally will provide support to the participating organisations and will therefore receive priority responses to all issues. To help them work more effectively in this role, please email them using the appropriate email address for your local area:

Health Education England Regions	Generic mailbox
Midlands	wit.me@hee.nhs.uk
East of England	
London	Workforceintelligence.lase@hee.nhs.uk
North East and Yorkshire	WPINorth@hee.nhs.uk
North West	
South East: Kent, Surrey and Sussex	WorkforcePlanning.KSS@hee.nhs.uk
South East: Thames Valley and Wessex	WorkforceIntelligence.South@hee.nhs.uk
South West	WorkforceIntelligence.South@hee.nhs.uk

7.3 Third line support

HEE will be entitled to make direct contact with the HEL eWorkforce team.

We ask that they use the support request form but also understand that sometimes it is easier to ask us directly.

We will provide a common email address to a shared account to the HEE and Local Offices.

We will also provide mobile numbers to enable HEE Local Offices to contact us for critical issues. Please note: to dissuade users from using this services as the first point of contact, we will charge £50+VAT for improper use and will queue the issue as appropriate.